



Trustee Leadership Development, Inc.
Individual Trusteeship
and
Community Trusteeship

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COMMUNITY TRUSTEESHIP

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We are excited about your joining us in the work to develop resources which will encourage the development of trusteeship in all realms of our lives. These materials are newly developed and we are looking forward to hearing about your experiences in using them.

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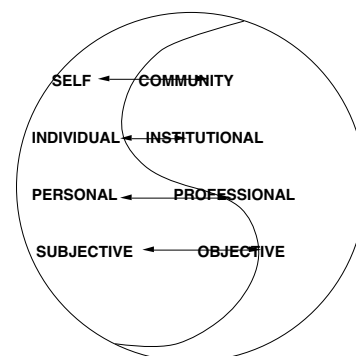
TRUSTEESHIP: DEVELOPING SELF, ORGANIZATIONS, AND COMMUNITY

THE LEGACY OF TRUSTEESHIP

Contemporary Americans are the inheritors of a unique legacy of trusteeship as expressed through our history of volunteerism and community service. Through volunteering we give expression to our abiding belief that we share responsibility for the quality of life within our communities. We truly believe in the necessity of citizen participation in the public sphere, and fully expect to participate in defining and articulating community concerns and issues, and in forming effective responses to them. We cherish our involvement in the establishment, support, and maintenance of organizations which address the agendas of need we have helped to identify and form.

The high value we place upon these expressions of civic virtue and our involvement in the development of community are integral to our national character. But the equally high value we place upon “unfettered individualism” has served to create tension between concern for community and individual self interest. Recent history demonstrates the difficulty we are having in managing this tension. Some of us wonder if we have contributed to an even deeper schism.

We have made rigid demarcations between self and community, i.e., between the realms of private and public, individual and institutional, personal and professional, and subjective and objective. We have perceived these as dichotomies, from which our choices are either /or; rather than as paradoxes which call us to the tasks of integration and wholeness. One significant consequence has been atrophy of our ability to make sense out of our lives - to see its meaning. Many lack an understanding of how what they do day to day is connected to a work much bigger and greater. The inability to make meaning out of our lives is reflected in a growing sense of isolation.



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Alex de Tocqueville, in his classic study of American character in 1835, expressed concern about the long term impact our strong emphasis on individualism would have on our sense of democracy. *“Not only does democracy make every man forget his ancestors, but it hides his descendents and separates his contemporaries from him; it throws him back forever upon himself alone and threatens in the end to confine him entirely within the solitude of his own heart.”* More contemporary voices, such as noted sociologist Robert Bellah, have raised similar concerns. Bellah’s thesis in *Habits of the Heart* is expressed quite well by Barry Schwartz in *The Battle for Human Nature*:

“What might be called the language of America, as embodied in the Constitution and as lived in daily life, was individualism. America was a collection of social atoms, each in pursuit of his own interests. In America, individualism was a matter of principle, a matter of right. But this individualism was also tempered by several “second languages” that united individuals into communities and bound them together. These second languages - one of religious conviction and one of civic virtue - were sources of moral tradition, of social mores, of habits of the heart. They were what made it possible for people in pursuit of private, individual interests, nevertheless to share public communal purposes. The price of modern, liberated America seems to have been these habits of the heart.”

The price has been high. We have been unable to interpret what the substance or significance of our “busyness” means. We have retained the “habits” - the engagement in action, the obsession with doing, but we have lost touch with the “heart” - the motivation for doing.

Concerns about the loss of community, the demise of a language to express our caring and to reinforce the moral and ethical responsibilities we have for the common good have stirred us to examine what needs to be done to better prepare individuals for service and leadership in their communities. And it has caused us to struggle with two questions: How can we cultivate a sense of responsibility for something beyond one’s own personal life? How can we help individuals reclaim the legacy of concern for and service to others?

How we choose to respond to the persistent “pull and tug” we experience between individual self-interest and the “common good” is both an expression of our identity and a test of character. Ultimately our choices in this regard will determine our very survival.

The manner in which we perceive the relationship between self

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interest and “the common good,” and seek to manage and balance them is a matter of trusteeship. Leaders who see themselves as “trustees” have the ability to see that individual and community interests are interconnected and interdependent. They continually strive to integrate the personal with the professional, the individual with the institutional, private with public, and the subjective with the objective. Because they have a highly developed capacity to see the inter-relatedness of individual and community interests, they will not choose one to the exclusion of the other, but will over time reach a balance which serves and enriches all. And they will know that there will be times when “to hold something in trust” means to place some value higher than their own self interest. Individualism and community should not be dichotomized, nor should either one be idealized; they can enhance each other. As Parker Palmer expresses it: *“We are formed by the lives which intersect us. The larger and richer our community, the larger and richer is the content of self.”*

THE PRACTICE OF TRUSTEESHIP

INDIVIDUAL REALM

Trusteeship includes being responsible for the creation and nurture of the common good. How you live out this responsibility is in part determined by the arena in which it is expressed: individual, organizational, community. Trusteeship at the individual level is best described as mentoring. In mythology mentors are wise and loyal advisors, who appear at the beginning of a long journey. They reappear along the way at key moments of crisis, danger, or challenge, and assist in problem solving. They also reappear just before the completion of the journey. Although these mentors have experienced their own journey and have a familiarity with the stages and phases ahead, they share their knowledge in a manner which empowers the person to experience the uniqueness of their own journey.

So mentors represent knowledge, reflection, insight, wisdom, cleverness, and intuition. They serve as guide, embody hope, play a key role in transformation, point out dangers and opportunities, ask questions, provide a map for understanding the whole, share information, engender trust, issue challenges, provide encouragement, and offer vision. All of these qualities and actions describe the characteristics of holding someone in trust.

The mentoring relationship is one in which one person sees the potential for the growth and development of another, and assumes the responsibility and capacity for nurturing this potential. The

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mentor is seen as possessing wisdom and knowledge yet to be attained by the mentee; however, the mentor's role is to help the mentee discover their own gifts and qualities, things they already possess but haven't claimed. In many ways they enable the individual to give birth to their potential.

The wisdom and power of the mentor come from *knowing* - knowing the history of their own journey, its uniqueness and its universality. Their knowledge is also of a larger world and they are able to provide those mentored with a sense of "a bigger picture." They act from a base of personal integrity and possess a clarity of the present and prescience about the future. Mentors perceive themselves as being entrusted with the development of the individual - mentors are trustholders.

Preparing ourselves for trusteeship of individuals means we must bring together what we have deemed as opposites in our lives: private vs. public; individual vs. institutional; personal vs. professional, and subjective vs. objective. We need a process which teaches us to develop a different way of thinking about and of seeing ourselves and others.

This process begins with becoming knowledgeable about self. Trusteeship requires a high level of self-knowledge. Robert Greenleaf, author of *Servant Leadership*, believed that the most dependable part of a servant leader and the major way an individual could tell whether they had achieved the desired outcome of servant leadership was through *psychological self-insight*. Such insight is derived from a knowledge of one's own story over time, i.e., people, events, situations, decisions which have helped to shape identity and character. A review of one's personal history of volunteerism and service can aid an individual's understanding of the deeper origins of their current involvements and activities, and can begin to identify the roots of motivation and commitment to serve. Such historical review can provide a picture of other trustees as role models and mentors, and of the events and forces which have shaped their involvement in community. It can also reveal the tensions between individual interests and community interests and how these have been managed over time. Taking time to reflect upon one's volunteer history and activities provides data from which meaning can be created and carried forth in the future. Being reminded of what and who has helped to shape us, and why we do what we do, can be powerful reinforcements to one's identity as trustee and legacy bearer.

Trusteeship involves a significant shift in perspective from management ("doing things right") to leadership ("doing the right

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thing”). It includes a base of knowledge about self, the organizations we’re involved with, and the larger community in which we live. This perspective involves the ability to see the whole, which is uncomfortable. With the bigger view in mind, we are immediately confronted with complex issues and concerns which seem to defy resolution; and a diverse chorus of voices all expecting to be heard. As Greenleaf states, “Awareness is not a giver of solace but a disturber of peace.” So, how can one maintain a wide span of awareness and listen to divergent voices without becoming overwhelmed by it all?

It begins with the concept of trusteeship which encourages depth reflection on history, clarity of mission, knowledge of publics, and a vision for the future. These are integral to an understanding of self, organization, and community. We believe that the concept of trusteeship holds great potential for enabling individuals to better manage complexity, paradox, and ambiguity. We think this process can help us to reclaim both our historical legacy of individuality and our desire for community and the common good, in ways which can provide both identity and connectedness, self interest and public interest, focus and flexibility, caring and competence, and leadership and service.

A review of personal history is a process which helps leaders develop a “wider span of awareness.” They are helped to develop the function of oversight, “the ability to see things whole,” which Greenleaf believes to be an essential characteristic of one who holds something “in trust.” The very act of going back in time to recollect and recapture beginnings and subsequent life activities is a mini-respite from which an individual can receive new energy to return to action - action renewed with meaning.

Self knowledge is the foundation for determining your own individual calling or mission. What is my purpose? Why do I exist? Why do I do what I do? Knowledge of self can result in clarity about personal values and beliefs. As James Kouzes and Barry Posner, the authors of *The Leadership Challenge* state,

“You can resolve the conflicts and contradictions of leadership only if you establish for yourself an ethical set of standards on which to base all your actions. You can avoid excessive pride only if you recognize that you are human and need the help of others. All of your individual complexities are held together by a fundamental set of values and beliefs. Developing yourself as a leader begins with your value system.”

Clarifying your own values and visions is a highly personal matter. No one else can do it for you. To exhibit to others

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harmonious leadership - where words and deeds are consonant - you must be in tune internally.

Trustees work to discern the beliefs and values which have guided and continue to influence their decisions and actions. They seek to evaluate whether their beliefs and values have matched their actions. Where incongruity exists, they work to achieve fit and balance where possible and appropriate.

The importance of knowing one's personal mission cannot be overstated. Individually, leaders who are clear about their mission have a better foundation for deciding where they can invest their talents and time. This knowledge provides us with a foundation for deciding where to best commit our time and talents. It can help us to decide if and where there is an appropriate match between our personal mission and the mission of the organizations seeking our involvement. These are the leaders that Warren Bennis, author of Leaders: Strategies For Making Change, described as capable of "managing attention." People are drawn to leaders who are self-differentiated and clearly focused. Clarity about one's mission is a major component of compelling leadership and it is foundational to trusteeship.

Knowledge and understanding of whom you wish to serve is another important component of trusteeship. Which persons, groups, organizations are the recipients of your time, talents, skills, and resources? Examples include family, colleagues, friends, work, church, volunteer groups, etc. Which of these publics are your priority and why? These questions relate more to one's personal mission and deeply held values than to issues of time management. Your answers to them will help you to set reasonable boundaries. How you apportion your time and other resources speaks volumes about what is important to you. Preparation for trusteeship involves assessing whether the publics you say you are most concerned about are those you are spending appropriate amounts of time, energy and resources on. The significant questions are: Do you have internal integrity? Is there congruence between what you believe and what you do?

The last area of knowledge required for individual preparation for trusteeship is that of future. This is the ability to plan for your future growth and development as a person. A knowledge of history, sense of mission and clarity about service to others provides a solid foundation for envisioning and planning for the future. These plans originate from your dreams, are the source of your energy, and become manifest in the expression of your commitment over time.

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In summary, a knowledge of self born out of history of service and commitment, personal mission, and vision of leadership, is sound preparation for holding something in trust, whether it is an individual, an organization, or a community.

ORGANIZATIONAL REALM

A primary example of trusteeship of an organization is membership on a board. The qualities we described earlier in the mentor/mentee relationship also exist between a trustee and the organization. Trustholding in this realm includes the familiar components of a knowledge of history, mission, public, and a vision of its future.

Knowledge of the organization's history is a story of *the institution's journey*. The history of an organization is its unique story and identity. History chronicles the collective institutional memory: significant people, events, issues, challenges and successes which have shaped the organization over time. It's review identifies who has "held the organization in trust" over time. This looking back in time reveals a pattern of phases and stages and provides indicators of what will be needed to position the organization for excellence in the future.

The review of history can be a diagnostic process; it helps organizations assess and better understand their uniqueness, their strengths, their challenges. And it can provide an opportunity for the celebration of all that an organization stands for, i.e. its beliefs, values, endurance, capacity to withstand adversity, triumphs, etc.

Effective organizational trusteeship stems from knowledge of its calling or mission. Mission raises two key questions: (1) Why does the organization exist?, and (2) Whom does it serve? The answer to the first question is one which reflects the heart and soul of an organization. The significance and passion of mission are captured in Robert Lynn's words:

"At the root of the creative institution is a shared sense of vocation or, if you prefer, a common calling. In both the Jewish and Christian traditions, the presence of calling is embraced as a gift. The consequences of that gift are evident in a corporate sense of identity and in a unifying loyalty to a set of purposes. If that root sense of mission either has died or is decaying, the whole institution will sooner or later be affected in every respect. Nothing can be more subtle or serious an ailment than this sort of root disease. But whenever an institution undergoes renewal, its new life often springs from a deepened commitment to its vocation."

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Mission is the standard by which all of the organization's programs, services planning and decision-making are evaluated. It, more than any other component, provides a foundation for assessing organizational congruence. Is there a fit or a match between what an organization says it believes and what it does? The continual raising up of these questions is an opportunity for change, reaffirmation and renewed commitment to the deeper values of the organization.

"Whom do we serve?," the second question in mission, reminds trustees of organizations that they must also be knowledgeable about the organization's publics. It reminds trustees of the meaning of service and helps them to establish boundaries of outreach and accountability. Developing a knowledge of publics helps trustees to develop the capacity to listen to diverse voices, to hear their needs, and to see the organization in relationship to the larger community.

Trusteeship of organizations requires a perspective which is inclusive of a broader community. It recognizes the contextual complexities the organization lives within, and values the inter-connectedness of the parts of the whole. This perspective is the "big picture" focus so necessary for visualizing creative, relevant programs and in forming the organization's future.

Trusteeship of organizations also means having a sense of the future. This includes the ability to vision - to protect the existence of the organization beyond the boundaries of concrete knowledge and current reality. This is high risk behavior and opens one to uncomfortable vulnerability; so most boards tend to revert to the present and rework tired and weary goals.

Planning which springs from trusteeship is grounded in a knowledge of the organization's history, mission and publics. Trustees can then move beyond current reality and dream the preferred image of the future. The ability to see beyond the present and to create meaning from complexity, and to manage unexpected change is the mark of bold leadership and exemplifies what it means to "hold an organization in trust." Providing trustees with a process which encourages visualization of the future can help them to develop strategic plans which can position the organization to adapt and manage change effectively.

COMMUNITY REALM

We have discussed trusteeship in both the individual and organizational realms. One can also be a trustee of community. To

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achieve this state we begin again with history. Like individuals and organizations, communities have stories too, and those who are trustees of them see to it that these stories are preserved and told. The process of history taking and sharing at this level is demanding, but necessary for those who hold the community in trust. *What are the origins of the community? Who were its trustees? What were the significant events, issues, decisions which defined the community?* These kinds of questions help guide leaders to trace the origins of current issues, and they give guidance about how to approach or intervene in current problems. Just as history in the individual and organizational realms is not just a chronological litany of names and numbers, it is more than a recitation of facts and figures at the community level. History gives *meaning* to a community's existence and expresses what has been unique and distinctive about it. A review of history can be both diagnostic and curative in this realm; for it enables leaders to better evaluate and appreciate a community's strengths and challenges. And it can provide an opportunity for the celebration of accomplishments while still identifying opportunities for change.

Trusteeship of community requires an appreciation and knowledge of one's personal mission and an understanding and choice about how it is *expressed in community*. It is equally important to be aware of the diversity of beliefs and values represented in community, and to determine where your mission has the best fit, and where it will be challenged. This requires the ability to listen, to be open to discomfort, to desire to learn and change, and the capacity to acknowledge differences without fear of loss of identity or of relationships. The importance of this process is expressed well by James Kouzes, author of The Leadership Challenge:

"Extensive knowledge of history and the outside world only increases your awareness of competing value systems, of the many principles by which individuals, organizations, and States can choose to function. You cannot lead others until you have first led yourself through a struggle of opposing values."

A discussion of trusteeship at the community level calls for the ability to include a myriad of voices in the articulation and solutions of social problems. Our history demonstrates that our roots are deeply planted in diversity, but our ability to manage diversity well is weak. Our challenge is to learn to be open to, but not overwhelmed by the complexity of need, the multiple and competing interests, and the inherent pressure in such situations to act too quickly or to give up.

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An awareness of publics in the community realm includes assessing who is being well served, poorly served, or not served at all. It involves assessing available resources and determining whether the distribution of them is for the benefit of all. Such an assessment can help to identify how existing resources can be better used to address needs and can indicate what new resources will be required in the future. Through policy setting, legislation, practice and/or neglect communities prioritize who the recipients of their resources will be. Trusteeship seeks to ensure that decisions/choices are made in a process which is inclusive and respectful of diversity. Although publics in community are frequently “separated” by differences of wealth, race, gender, status, education and geography, they do not (nor can they) live completely independently of each other. Trustees of community remember that their historical legacy and unique identity is one of care and concern for a larger community in all of its diversity. We are interdependent and mutually responsible for one another. Denial and avoidance will not change this fact; they can only weaken our ability to care for one another with compassion and competence. Any diminishment of our ability to care for and serve others is a diminishment of community.

To hold a community in trust means that one must have vision - vision emergent from a knowledge of community history, considerate of its beliefs and values, and attendant to and inclusive of the many voices of its publics. It is vision that can influence and shape the community's agenda. Trustees are initiators of, and participants in the vision. They are better able to point the way. They ensure the articulation of the vision in creative, compelling ways; and through their ability to listen to others, assure its authenticity and concern for the common good.

Vision which emerges from a clear sense of history and mission can provide the insight, inspiration, and innovation needed to align major forces to effectively bring about community change. Vision is not a guarantor of a problem-free community. What it can do is serve to align energy, coalesce people, generate resources and provide a context for decision-making and setting priorities. When a vision of what a community can be and do exists, and is well articulated, the spirit of community is strengthened. People experience a shared context within which they can better evaluate their own sense of mission and commitment to action. Vision will not eliminate dissent and conflict, but it can allow for more room to embrace pluralism and diversity, to acknowledge our relatedness, and to negotiate and collaborate in constructive and productive ways.

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Vision enables trustees to anticipate and reflect upon future issues and trends and to plan for ways to respond to and manage them. Anticipation positions trustees to be more pro-active and responsive in the face of pressing community problems. More thoughtful, effective responses, which address the needs of people, can result from this ability.

REAFFIRMING THE LEGACY

Voluntary associations provide us with a unique opportunity to reintroduce our “second language” and preserve those “habits of the heart” some are concerned we have lost. We hope to accomplish this through providing a different kind of education to those who desire to become trustees; trustees of individuals, organizations, and communities. We believe the preparation for trusteeship is integral to the development of leadership that can strengthen voluntary organizations and communities, and improve their capacity to lead *and* serve.

This kind of preparation for trusteeship flows from the vision we have for leaders and for their communities. We risk articulating it in the face of many harsh realities because we believe it can be accomplished. What is at stake is not just the preservation of our historical legacy of service, but our ability to effect change which leads to a nation of strong communities; communities which nurture and empower their citizens to be caring, sensitive, knowledgeable trustees as they seek to serve the common good. Through efforts to make the vision a reality we can preserve the best of our history and character, as we move into a future we help to shape.

Katherine Tyler Scott
President
Trustee Leadership Development, Inc.
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Trustee Leadership Development, Inc.

Trustee Leadership Development, Inc. (TLD) is an innovative consultation company, committed to fostering excellence in leadership. We are dedicated to strengthening the leadership capacity of individuals and organizations through processes that create sustainable change, improved performance, and contribute to organizational growth.

We believe that effective leadership originates from the capacity to—*hold* individuals and organizations *in trust*.™ TLD helps to develop this capacity through customized leadership education that engages the both the intellect and spirit and cultivates self-knowledge and competence.

Our *Integrative Model of Leadership*™, focuses on the development of both *adaptive* and *technical* skills and addresses the *inner* (character and authenticity) and *outer* (performance and results) aspects of leadership. This approach has enabled over 39,500 individuals and 888 organizations to address complex challenges and prepare for the future.

Our services include:

- Executive assessment, coaching and mentoring
- Transition and collaboration management
- Leadership curriculum design and facilitation
- Governance Training
- Change Management
- Conflict Resolution

TLD also offers workshops and institutes that introduce practitioners to cutting-edge research in the area of leadership formation.

Trustee Leadership Development works in strategic alliance with ThoughtBridge, LLC, an international firm based in Cambridge, Massachusetts, which specializes in mediation, negotiation, leading change and post-merger integration. This partnership expands TLD's capacity to offer state-of-the-art leadership and organizational development consulting.

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